Decentralized Service Delivery Report (SDR) Job Aid

Overview

When clients are served at multiple locations, providers may choose to have service information entered in the SDR at each location, instead of centrally. This increases efficiency when entering large SDRs. The release function is typically the responsibility of the service location, while authorization is typically the responsibility of the parent organization.

There are a few additional things to keep in mind:

1. If the SDR includes a header-level offset, it should be done at the parent organization before any clients are released.
2. A few measures are necessary to ensure that users don't accidentally lock each other out of client records.
   - When accessing the SDR, be careful to select the ***location name*** rather than ***all locations***.
   - Always click **[Unlock Enrollments]** before leaving an SDR.
3. The provider must devise a business process to clarify which user(s) will do the following:
   - Create the SDR
   - Enter header-level offsets (if applicable)
   - Enter the SDR reference number (if applicable)
   - Release the SDR
   - Authorize the SDR

   Who performs these functions can be controlled by security roles.

Process

1. Create a new SDR
2. Enter the following:
   - SDR reference number (if applicable)
   - Header-level offsets (if applicable)
   - Service delivery information
   - Client-level offsets (if applicable)
   - SDR notes (if applicable)
3. Release the SDR.
4. Authorize the SDR.

> ***Important:*** When accessing the SDR for any reason, don't forget to **unlock all enrollments** before exiting.

The following tasks are performed by a designated user at the parent organization:	
Create an SDR	1. Click the **Billing** module. Select **Service Delivery Report Search** from the navigation bar. *The **Service Delivery Report Search** page appears.* 2. Click **[Add/Edit SDR]**. *The **Service Delivery Report** page appears.* 3. Select a contract from the drop down box; click **[Select Contract]**. 4. Select an activity from the drop down box; click **[Select Activity]**. 5. Select service period information from the drop down box. 6. Select a location from the drop down box. 7. Click **[View Service Period]**. *The **Service Delivery Report Summary** page appears.* 8. Click **[Add New SDR]** if no SDR details are found. *The page reappears with a Regular SDR Draft link. To access the roster of clients click the link.* ***Note:*** An SDR for the current month cannot be created until all previous months on the contract have been authorized.
Enter SDR Reference Number (if applicable)	1. Access the **Service Delivery Summary** page. 2. Select **Service Delivery Header** from the navigation bar. *The **Service Delivery Header** page appears.* 3. Enter SDR reference number (if applicable). 4. Click **[Save Changes]**. *A message appears, "Record has been updated successfully."*
Enter an Offset at the SDR Header-Level (if applicable)	1. Access the **Service Delivery Summary page.** 2. Select **Service Delivery Header** from the navigation bar. *The **Service Delivery Header** page appears.* 3. Enter offset amount. 4. Select an offset reason from the drop down box. 5. Click **[Save Changes]**. *A message appears, "Record has been updated successfully."* ***Note:*** If you apply an offset at the header-level, you **cannot** use an offset at the client-level.
Important: When accessing the SDR for any reason, don't forget to **unlock all enrollments** before exiting.	

The following tasks are performed by users at all locations:

Access an existing SDR	1. Access the **Service Delivery Report Search** page. 2. Enter search criteria. 3. Click **[Search]**. *The search results appear.* 4. Select an SDR. *The **Service Delivery Summary** page appears with the roster of clients.* ***Important:*** When you choose ***all locations***, you prevent other users from editing their client rosters, even though you cannot see their clients.
Enter Service Delivery Information	Service delivery information may be entered in a single session or throughout the billing period and released at the end of the month. **Important tips:** • You can use the **Comments** field on the **Record Service Delivery** page to enter a note at the client-level. • On the **Record Service Delivery** page to record or edit information for the next client in the list, click **[Next Client]** or to return to the previous client use **[Previous Client]**. To clear the Service Delivery Report Calendar, click **[Clear All]**. • When you are finished entering information, always click **[Save Changes]**. If you **do not** save changes you will lose the data you've just entered. • When you are finished with a session, click the **[Unlock All Enrollments]** button on the **SDR Summary** page. If you do not unlock the enrollments, other staff users may not be able to access the SDR.
Record Service Information for Multiple Clients at one time	**Apply a Service Delivery Pattern:** 1. Select **Service Delivery Pattern** from the navigation bar. 2. Complete the service delivery pattern information. 3. Select all clients who receive services in this pattern. 4. Click **[Apply Pattern]**. *Once the pattern is applied, the **Service Delivery Summary** page appears.* ***Tip:*** Use **[Select All]** and **[Deselect All]** buttons to select or deselect all clients. Services added through a pattern can only be removed by editing client records individually. ***Note:*** The **Include disenrollment date** checkbox allows the user to bill for the disenrollment date. This is determined by each individual agency. Please be sure to confirm with your Agency Contract Manager.

Important: When accessing the SDR for any reason, don't forget to **unlock all enrollments** before exiting.

The following tasks are performed by users at all locations:	
Apply a pattern to a Single Client	1. Access the **Service Delivery Summary** page. 2. Click the Enrollment Id link for a client. *The **Record Service Delivery** page appears with client details.* *3.* Check off dates on calendar. *4.* Enter a unit amount in the textbox located beneath the calendar. *5.* Select an attendance status code from the drop down box located beneath the calendar. *6.* Click **[Apply Pattern]**. 7. Click **[Save Changes]**
Record or Edit Service Information for a Single Client	1. Access the **Service Delivery Summary** page. 2. Click the Enrollment Id link for a client. *The **Record Service Delivery** page appears with client details.* 3. Enter number of service units and attendance codes on calendar. 4. Click **[Save Changes]**. *A message appears, "Record has been updated successfully."*
Copy Service Delivery Information	1. Access the ***Record Service Delivery*** page for a client. 2. Enter service delivery information if needed. If changes were made click **[Save Changes]**. 3. Click **[Copy Characteristics]**. 4. Select one or more clients and click **[Apply Pattern]**. *The **Service Delivery Summary** page appears with the newly entered information.* ***Tip:*** Use **[Select All]** and **[Deselect All]** buttons to select or deselect all clients.
Enter an Offset at the Client-Level (if applicable)	1. Access the **Record Service Delivery** page for a client. 2. Enter offset amount. 3. Select an offset reason from the drop down box. 4. Click **[Save Changes]**. *A message appears, "Record has been updated successfully."* ***Note:*** If you apply an offset at the client-level, you **cannot** use an offset at the header-level.

Important: When accessing the SDR for any reason, don't forget to **unlock all enrollments** before exiting.

The following tasks are performed by users at all locations:	
Add an SDR Note	1. Access the **Service Delivery Summary** page. 2. Select **Notes** from the navigation bar. *The **Service Delivery Notes** page appears.* *3.* Click Add SDR note link if no SDR information was found or **[Add SDR Note]**. *The **Service Delivery Note Add** page appears.* 4. Enter note. 5. Click **[Save New SDR Note]**. *The **Service Delivery Notes** page appears with the entered note.*
Unlock All Enrollments	6. Access the **Service Delivery Summary** page. 7. Click **[Unlock All Enrollments]** button. *The **Service Delivery Report Summary** page appears.* ***Tip:*** When you are done editing, you must manually unlock the SDR to allow other users access to the clients. If you forget to unlock, the enrollments will unlock automatically overnight.
Release an SDR	1. Access the **Service Delivery Summary** page. 8. Click the checkbox to confirm data is accurate and complete. *By clicking the checkbox you are complying with legal requirements on releasing a service delivery report.* 9. Click **[Release Service Delivery]**. *On the **Service Delivery Summary** page the **Service Delivery Progress** bar appears showing release status.*
Important: When accessing the SDR for any reason, don't forget to **unlock all enrollments** before exiting.	

The following task is performed by a designated user at the parent organization:	
Authorize an SDR	1. Access the **Service Delivery Summary** page of a released SDR. 2. Click the checkbox to confirm data is accurate and complete. *By clicking the checkbox you are complying with legal requirements on authorizing a service delivery report.* 3. Click **[Authorize Service Delivery]**. *Once the adjudication is complete, the **Service Delivery Report Summary** page appears.* ***Note:*** If the SDR Authorizer finds an error, the SDR can be disapproved by clicking the **[Disapprove SDR]** button. Disapproving the SDR changes the status from **released** to **draft** so the error can be corrected. You can disapprove an SDR in **released** or **partially released** status (when any one of the clients on the SDR is with out any services).

Supplemental SDRs and Corrections

A designated user from the parent organization should monitor client denials, create supplemental SDRs, and notify locations that need to enter data or make corrections.

The following task is performed by a designated user at the parent organization:

Create a Supplemental SDR	1. Access the **Service Delivery Report Search** page. 2. Click **[Add/Edit SDR]**. *The page reappears with a supplemental SDR Draft link.* 3. Click the Draft link. *The **Service Delivery Summary** page appears with a roster of clients.*

The following tasks are performed by users at all affected locations:

Enter Services on a Supplemental SDR	You may need to enter services that were omitted from regular SDR. Or, if the clients on the SDR have been denied, you may need to resubmit the correct information. 1. Access the **Service Delivery Summary** page. 2. Click the Enrollment Id link for a client. *The **Record Service Delivery** page appears.* 3. Enter service information on calendar. 4. Click **[Save Changes]**. *A message appears, "Record has been updated successfully."*
Void Services on a Supplemental SDR	***Note:*** If the SDR has been paid and services were incorrectly submitted, use the **Void** button to void the entire previous month's record. You can then resubmit the correct information. To void: 1. Access the **Service Delivery Summary** page. 2. Click the Enrollment Id link for a client. *The **Record Service Delivery** page appears.* 3. Click the radio button under the **Previous Service Delivery Reports** heading. 4. Click **[Void]** and then **[Save Changes]**. *The claim is now voided.*
Copy Services	To copy: 1. Click the radio button under the **Previous Service Delivery Reports** heading. 2. Click **[Copy]**. *The previous month's regular SDR has been copied over.* 3. Edit service information on the calendar, if needed. 4. Click **[Save Changes]**. *A message appears, "Record has been updated successfully."*

Release and authorize supplemental SDRs as described previously.

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